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FinancialPlanning



Retirement

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By Rob Burgess

Reporter

It's been great getting to know you all here on the retirement beat these past few months. Since July, I have been covering for reporter Nathan Place while he's been on paternity leave.

However, Nathan is returning this week, and next week I'll be taking over the investment strategies and technology beat. So, this will be the final Wednesday I'll be in your inbox with the "Retirement" newsletter. But, don't worry, we'll meet again starting next Thursday in the "Wealthtech Weekly" newsletter.

As always, thank you for reading! Talk to you next Thursday!

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TOP STORIES

PROFESSIONAL DEVELOPMENT

Tips on passing the CFP exam from those who have been there



While the process of preparing for the 170 multiple-choice-question test can be expensive, time-consuming and nerve-racking, there are ways to make it less unpleasant and more successful.

- **Some advisors say business interests trump personal politics at the voting booth**

According to Financial Planning's research, most registered Republicans polled seem to have aligned their personal and business interests, while registered Democrats were nearly evenly split.

- **Ahead of Election Day, financial advisors' confidence highest in 6 months**

Despite the increase in overall confidence, election anxiety has remained a potent force for financial advisors and clients.

- **What's sparking 16 quarters of annuity sales growth?**

Sales were mostly flat until 2020. Over the past four years though, they've nearly doubled.

- **The Ladder: Kay Lynn Mayhue on having the guts to change paths**

The president of Merit Financial Advisors said deciding to merge her previous firm instead of following a succession plan allowed her to shift perspective.

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